



Defining New Sales Dimensions with Salesforce

Implementing Salesforce and Pardot

OBJECTIVE

Migrating legacy ACT CRM system to Salesforce while maintaining the information for the different stages of the sales cycle, from open to close, through various applications. MailChimp, Excel sheets, and QuickBooks were all involved, so a system was needed to perform the entire process and engage all teams from marketing to operations.

CHALLENGES

- Duplicate entries from sheets, nearly 25k records that needed to be managed
- Reviews of incorrect or incomplete data needed to be performed
- Poor project management needed to be streamlined for efficiency
- Tools were failing to collect MQL leads, and there was no strategy
- Pardot needed to be integrated with Salesforce

APPROACH

- Implementation of SFCD for VintageView for management of data in the system
- Salesforce custom application built to manage sales cycle from lead identification to closing on an opportunity
- Data migration from ACT CRM to Salesforce CRM with a cleanse performed
- Lightning application built to integrate the CAD process
- Automation of scheduler and batch class designed
- Pardot to Salesforce CRM connected
- Integration of Pardot with website for lead scoring and nurturing while building a prospect list and automating nurturing sequences
- Landing pages and forms created for lead management

BUSINESS BENEFITS

- Legacy data was validated and routed to appropriate lead owners for easy follow up leading to more sales
- CAD project management was automated, reducing manual work
- Automation of quarterly business reviews saved time and effort
- Leads with efficient ROI were generated through campaigns

INDUSTRY

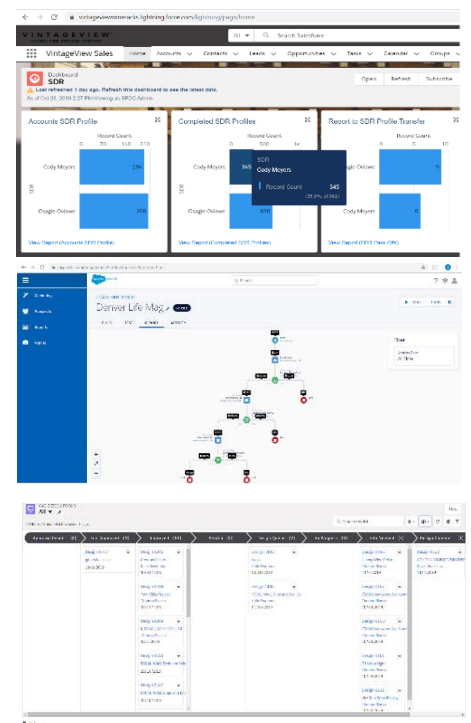
Manufacturing

CUSTOMER PROFILE

US based enterprise with 15+ years of experience in the manufacturing industry.

TECHNOLOGY AND TOOLS

- Sales Cloud
- FastCall
- Chatter
- Custom-built project management application
- Salesforce Engage
- Pardot
- Outlook integration
- Lightning platform



ABOUT CLOUDQ

CloudQ helps companies succeed by consulting, implementing solutions, and providing certified professionals. We're one of the INC 5000 fastest-growing private companies, and we're based in Alpharetta, GA. We specialize in cloud-based technology implementation and are a Silver Consulting partner with Salesforce and have a transparent, highly-efficient, customer-centric business model.

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